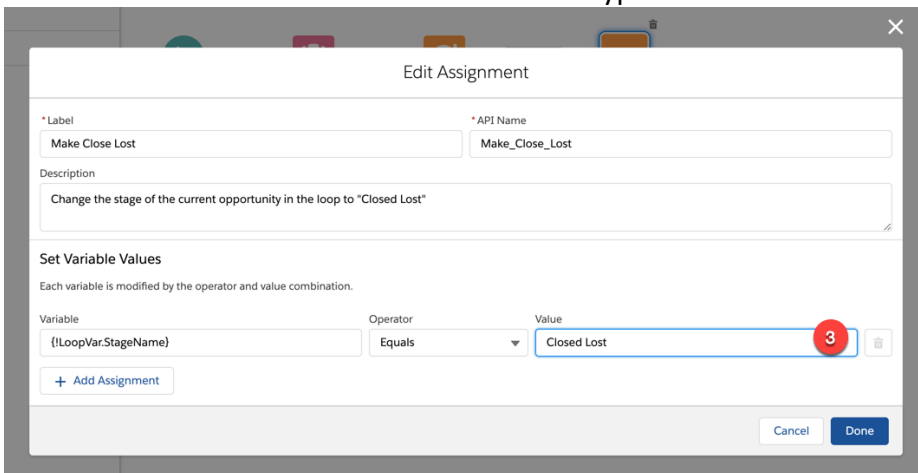


Optional Customization Guide

Quick Close Opps

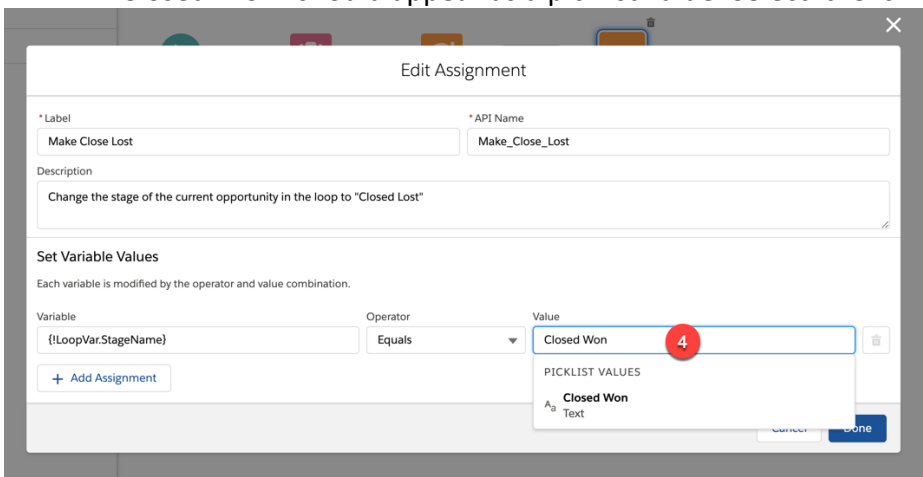
Modify the Flow: Instead of “Closed Lost,” change all open opportunities to “Closed Won.”

1. Open the Flow “Close Lost All Opps.” (From Setup, search for Flow. Click Open next to “Close Lost All Opps.”)
2. Double click on the Assignment element “Make Close Lost”
3. Click into the value “Closed Lost” and type in “Closed Won”



The screenshot shows the 'Edit Assignment' dialog box. The 'Label' is 'Make Close Lost' and the 'API Name' is 'Make_Close_Lost'. The 'Description' is 'Change the stage of the current opportunity in the loop to "Closed Lost"'. In the 'Set Variable Values' section, the variable is '{!LoopVar.StageName}', the operator is 'Equals', and the value is 'Closed Lost'. A red circle with the number 3 is next to the value field.

4. “Closed Won” should appear as a picklist value. Select it. Click “Done.”



The screenshot shows the 'Edit Assignment' dialog box. The 'Label' is 'Make Close Lost' and the 'API Name' is 'Make_Close_Lost'. The 'Description' is 'Change the stage of the current opportunity in the loop to "Closed Lost"'. In the 'Set Variable Values' section, the variable is '{!LoopVar.StageName}', the operator is 'Equals', and the value is 'Closed Won'. A red circle with the number 4 is next to the value field. A dropdown menu is open showing 'Closed Won' as a picklist value.

5. Click “Save As.”

- a. To continue to use the existing button with the same Flow, save as a new version NOT a new flow. Update your Flow Label and Description to indicate the change you made.

The screenshot shows the 'Save as' dialog box with the following details:

- Title:** Save as
- Buttons:** 'A New Version' (selected) and 'A New Flow'.
- Flow Label:** Close Won All Opps
- Flow API Name:** Close_Lost_All_Opps
- Description:** Change the Stage on all open opportunities on a particular account to Closed Won using a Quick Action on the Account record.
- Type:** Screen Flow
- Link:** Show Advanced
- Buttons:** Cancel and Save

Red callout circles with the numbers '5' and the letter 'A' are positioned over the 'A New Version' button and the 'Flow API Name' field, respectively.

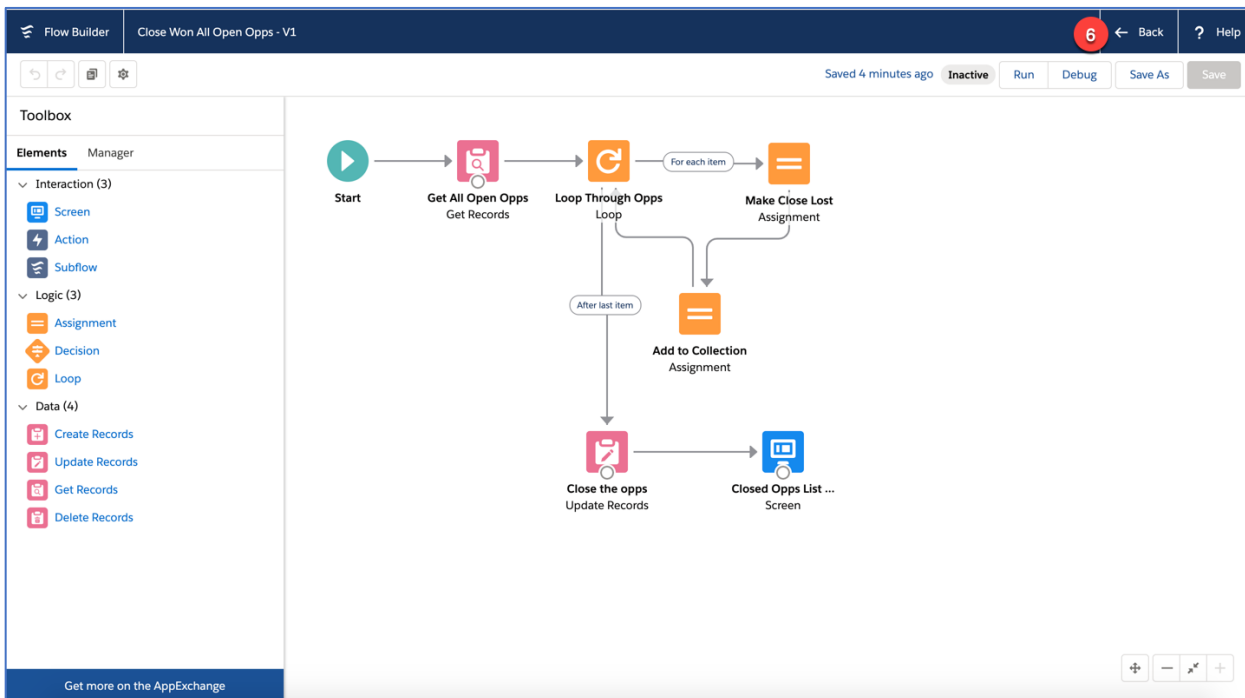
- b. If you intend to make a new button, save as a new flow.

The screenshot shows the 'Save as' dialog box with the following details:

- Title:** Save as
- Buttons:** 'A New Version' and 'A New Flow' (selected).
- Flow Label:** Close Won All Open Opps
- Flow API Name:** Close_Won_All_Open_Opps
- Description:** Change the Stage on all open opportunities on a particular account to Closed Lost using a Quick Action on the Account record.
- Type:** Screen Flow
- Link:** Show Advanced
- Buttons:** Cancel and Save

Red callout circles with the numbers '5' and the letter 'B' are positioned over the 'A New Flow' button and the 'Flow API Name' field, respectively.

6. Click “Back” in the top right.



7. Click “Activate.”

The screenshot shows the Setup Flows page in the Salesforce interface. The flow is titled "Close Won All Open Opps". The "Flow Detail" section shows the flow label, description, API name, namespace prefix, type, active version, template, and creator. The "Flow Versions" section shows a table with columns for Action, Flow Label, Version, Description, Built with, Created Date, Type, and Status. The "Activate" button is highlighted with a red circle containing the number 7, indicating the step to click "Activate".

Action	Flow Label	Version	Description	Built with	Created Date	Type	Status
Open Run Activate	Close Won All Open Opps	1	Change the Stage on all open opportunities on a particular account to Closed Won using a Quick Action on the Account record.	Flow Builder	8/27/2019 4:00 PM	Screen Flow	Inactive

8. If you are using the existing button with a new version of the Flow, you are all done.

9. If you want to make a new button for your new flow, follow these steps:
 - a. From Setup, click “Object Manager”.
 - b. Click “Account.”

Object Manager

LABEL	API NAME	DESCRIPTION	LAST MODIFIED	DEPLOYED	CUSTOM
AB Test	et4ae5__abTest__c		7/12/2019	✓	✓
Account	Account				
Account Brand	AccountBrand				
Account Contact Relationship	AccountContactRelation				
Account Insight	Account_Insight__c	Master Object which groups related Articles with an Account	7/27/2018	✓	✓
Account Insight Article	Account_Insight_Article__c	Detail Object that represents an editable article	7/27/2018	✓	✓
Account Soft Credit	npsp__Account_Soft_Credit__c		8/13/2019	✓	
Activity	Activity				
Additional Document	SBQQ__RelatedContent__c	Links certain marketing content (datasheets, specifications, case study) to a product or a template.	7/27/2018	✓	
Address	npsp__Address__c	Custom object for storing additional addresses for Household Accounts in the Nonprofit Success Pack.	8/13/2019	✓	
Address	Address				

- c. Click “Buttons, Links, and Actions.”
- d. Click “New Action.”

Buttons, Links, and Actions

LABEL	NAME	DESCRIPTION	TYPE	CONTENT SOURCE	OVERRIDDEN
Accounts	Tab			Standard page	
Add to Call List	MassCreateCallList			Standard page	
Add to Call List	CreateCallList			Standard page	
Add to Campaign	AccountAddToCampaign			Standard page	
Billing	Billing		Detail Page Link	URL	
Check for New Data	XClean			Standard page	
Clean	ListClean			Standard page	
Close Open Opps	Close_Open_Opps	Mark all open opps on this account closed lost.	Flow	Flow	

- e. Choose “Flow” as your Action Type.
- f. Choose your Flow in the drop down list of Flows. If you don’t see it, go back and make sure you activated it!

Account Actions
New Action

Enter Action Information Save Cancel

Object Name Account i

E Action Type Flow ⌵

Flow Close Won All Open Opps ⌵ **F**

Standard Label Type --None-- ⌵ i

Label Close Won Opps ⌵ **G**

Name Close_Won_Opps ⌵

Description i

Icon ⚡ [Change Icon](#)

Save Cancel

- g. Fill in your name, label and description and save!